



**Request for
Proposal (RFP)
For
Portage County
Document Scanning
& Services RFP**

2022-17

Issued by:

Portage County
Purchasing Department

**Proposals must be submitted
No later than 2 PM 10/13/2022 to:**

**Portage County Purchasing
1462 Strongs Ave
Stevens Point WI 54481**

LATE PROPOSALS WILL BE REJECTED
There will not be a public opening for this Proposal

For further information regarding this
RFP contact Chris Schultz
At (715) 346-1393
Email: schultzc@co.portage.wi.us

Issued 9/15/2022

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1. General Information

1.1. Introduction

The County of Portage Wisconsin (County), through its Purchasing Department (Purchasing), requests proposals to establish a contract for the scanning of Planning and Zoning Department paper files and conversion of microfilm images to a digital image format for digital record keeping purposes.

The County of Portage as represented by the Purchasing Department intends to use the results of this Request for Proposal (RFP) to award a contract for the above listed project. The contract administrator will be determined at the time of the contract award. Retain a copy of these proposal documents for your files. Should you receive an award, these documents may become exhibits or part of your contract terms and conditions.

Contract Execution: Portage County utilizes a web based electronic signature program (DocuSign) for the execution of contracts that do not require notarization. By submitting your proposal, you are agreeing to the use of this program to sign documents should you receive an award. There is no cost to the proposer associated with this process.

1.2. Definitions

The following definitions are used throughout the RFP:

Box is standard bankers box (10"x12"x15") with 12" storage capacity for legal size file folders

Contractor means the company, firm, or individual that is awarded the contract to scan Planning and Zoning Department paper documents and conversion of microfilm images to a digital image format.

County means the County of Portage Wisconsin

Drawer means a legal size drawer that is 27" deep.

Proposer/Vendor/Bidder means a company or individual submitting a proposal in response to this RFP

Purchasing means the County of Portage Purchasing Department

P&Z means Portage County Planning and Zoning Department

Files means files within the Planning and Zoning Department containing paper documents and maps used to represent issued permits and other department files intended to be maintained as a permanent record.

RFP means Request for Proposal

State means the State of Wisconsin

VendorNet means the State of Wisconsin's electronic purchasing information system

1.3. Scope

1.3.1. Project Description

Scan P&Z paper files and convert microfilm images to a digital image format for digital record keeping purposes. P&Z has several categories of files with slightly differing file

makeup and file naming needs. Details associated with the categories of files are described below.

These are some Notes on the proposed Scanning project. Files are grouped by subproject category with caveats for each subgroup category:

Sanitary Permits:

- There are 46 legal size drawers of historic sanitary permits. Estimate 320 permits per drawer, 12 pages per permit.
- Estimate 104 boxes: 142 permits per box, 1707 pages per box.
- Drawers are organized by Town, Range, Section. Within sections are file folders with tax parcel numbers containing 1 or more sanitary permits, grouped file folders at the beginning of that section with sanitary permits for various tax parcels in that section, grouped subdivision folders with sanitary permits for tax parcels in that subdivision.
- Most permits contain letter sizes, some legal or ledger sizes. A small % have large format plans.

Zoning Permits:

- Zoning permits on Microfilm cards from approximately 1960's-1990's. Estimate approximately 138 cards per inch x 9 inches = 1242 cards x (15 to 150 document pages per card, estimate 50 average) = 62,100 pages. Estimate 2-5 pages per permit. Estimate 15, 525 permits.
- Microfilm images are currently grouped by town, range, section.

BOA Appeals/Petitions:

- There are 17 legal size drawers of historic BOA files. Estimate 150 files per drawer average and 50 pages per file. File drawers average 24" filled.
- Estimate 34 boxes: 75 files per box, 3750 pages per box.
- Most files contain letter sizes, some legal or ledger sizes. A small % have large format plans.

P&Z Requests:

- There are 7 drawers of historic P&Z Requests. Estimate 150 files per drawer average and 50 pages per file.
- Estimate 15 boxes: 70 files per box, 3500 pages per box.
- P&Z Requests file drawers are organized by Town, Range, Section. Each file folder in the drawer represents a separate P&Z Request. File folders are labeled with the name of the petitioner; quarter section – Section, Town, Range; Municipality; Permit Number; and short description of request.
- Most files contain letter sizes, some legal or ledger sizes. A small % have large format plans.

Major Subdivision Files and Petitions for Modifications:

- There are 5 drawers of Major Subdivision and Petition for Modification files comingled. Estimate 100 files per drawer and 50 pages per file.
- Estimate 11 boxes; 45 files per box, 2250 pages per box.
- Most files contain letter sizes, some legal or ledger sizes. A large % have large format plans.
- Major subdivision file drawers are organized by Town, Range, Section. Each file folder in the drawer represents a separate Subdivision or Petition for Modification.

1.3.2. Objective/Needs

P&Z files need to be converted to a PDF format and appropriately named using a naming scheme format provide by P&Z. The contractor will also need to provide a database table of the named pdf files with columns representing the name of the file tax parcel number, file name/permit number, description along with municipality code, town, range, section, quarter/quarter.

P&Z currently has a background program that works with Microsoft File Explorer that when a named pdf file is placed within a specified windows folder the program reads the file name and imports the image into IMS21 using the name to create the needed indexes.

1.3.3. Clarifications and/or Revisions to this RFP

Portage County Purchasing is the sole point of contact for the County during the selection process. Contact with anyone else involved with this process without the prior authorization of Purchasing may result in the disqualification of your proposal. Proposers are expected to raise any questions, noted errors, discrepancies, ambiguities, exceptions, additions or deficiencies they have concerning this proposal **in writing through email by Thursday, September 29, 2022 at 2PM** to: Chris Schultz, Purchasing, Email: schultzc@co.portage.wi.us

If a proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this proposal after the above date, they shall immediately notify the above named individual of such error and request modification or clarification of the proposal document before the proposal opening date.

If the proposer fails to notify the County prior to the proposal due date of any condition stated above that reasonably should have been known to the proposer, and if a contract is awarded to that proposer, the proposer shall not be entitled to additional compensation or time by reason of the error or its correction.

Revisions to this request for proposal or answers to questions will be made only by an official written addendum issued by Purchasing. Addenda will be posted on VendorNet and on the Portage County Website. Proposers are responsible for checking these websites for any addenda before submitting a proposal. Failure to acknowledge addenda may disqualify your proposal.

<https://vendornet.wi.gov>

<http://www.co.portage.wi.us>

1.4. Pre-Proposal Site Visit and Document Inspections

A pre-proposal vendor document review is available at **10 AM on Monday, September 26, 2022.** Location for this review is The Planning and Zoning Department located in the Portage County Annex 1462 Strongs Ave, Stevens Point, WI 54481. An RFP addendum will be issued if the site document review is changed or cancelled. Attending the review is recommended to understand the scope and types of documents that require scanning. Proposer cannot charge the County for attending the document review.

1.5. Calendar of Events

Listed below are specific and estimated dates and times of actions related to this Request for Proposal. The actions with specific dates must be completed as indicated unless otherwise changed by the County. In the event that the County finds it necessary to change any of the specific dates and times, it will do so by issuing addenda to this RFP. There may or may not be a formal notification issued for changes of the estimated dates and times.

DATE	EVENT
09/15/22	RFP Issuance date
09/26/22	Proposer Pre-Site Visit Review of Documents 10AM
09/29/22	Last Day for Submitting Questions
10/4/22	Addenda posted to https://vendornet.wi.gov/ and http://www.co.portage.wi.us
10/13/22	Proposals due at or before 2:00 p.m.
Week of Oct 24	Interviews/Presentations (estimated date if needed)
Week of Oct 31	Notification of intent to award sent to proposers (estimated)
Week of Nov 21	Contract Award and start date (estimated)

1.6. Contract Term and Funding

The contract shall be effective on the date indicated on the purchase order or contract and shall continue until 12/31/2023. By mutual agreement of the agency and the contractor, the contract may be renewed up to three (3) additional one-year periods.

2. Preparing and Submitting a Proposal

2.1. General Instructions

The evaluation and selection of a contractor will be based on the information submitted in the proposal plus references and any required on-site visits, interviews/presentations or demonstrations. Proposers should respond clearly and completely to all requirements. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a proposal.

Elaborate proposals (e.g. expensive artwork), beyond that sufficient to present a complete and effective proposal, are not necessary or desired. The County encourages all proposers to print their submission double-sided to save paper.

2.2. Incurring Costs

The County is not liable for any cost incurred by proposers in replying to this RFP.

2.3. Submitting Proposals

Proposers must submit, in a sealed package, **One Original (identify) PLUS four identical copies** of all materials required for acceptance of their proposal on or **before 2:00 p.m., Thursday, October 13, 2022 to:**

**Portage County Purchasing
1462 Strongs Ave
Stevens Point, WI 54481**

All proposals must be received by the Purchasing Department by the stated time. Late proposals will not be accepted. Receipt of the proposal by the U.S. mail system does not constitute receipt of the proposal by Purchasing.

The County does not accept facsimile machine or email submitted proposals. All proposals must be packaged, sealed, and show the following information on the outside of the package:

**Proposer's Name and Address
Request for Proposal Title
Request for Proposal Number
Proposal Due Date**

COST PROPOSAL: Submit Original plus one (1) identical copy Attachment F. Seal in an envelope and submit within the proposal package. The outside of the envelope should clearly state "Cost Proposal" and the name of proposer.

2.4. Proposal Organization and Format

Proposal should be typed and submitted on 8.5 by 11-inch paper and bound securely with page numbers clearly indicated. Proposers responding to this RFP must comply with the following format requirements:

Tab 1 - COVER LETTER, RFP SIGNATURE PAGES: Include here any cover letter, Attachment A - RFP Signature and Authority Affidavit Form, any addenda signature pages, and Attachment C - Designation of Confidential & Proprietary Information Form.

The Signature and Authority Affidavit submitted in response to this RFP must be signed by the person in the Proposer's organization who is responsible for the decision as to the prices being offered or by a person who has been authorized in writing to act as agent for the person responsible for the decision on prices and services. Failure to provide forms/information with your bid submittal may disqualify your proposal.

Tab 2 - RESPONSE TO PROPOSER INFORMATION AND SOLUTIONS: Responses to the

requirements in the proposer information and solutions must be in the same sequence and numbered as they appear in this RFP. Include here completed Attachment B--References.

Tab 3 – MANDATORY REQUIREMENTS: Include Attachment D Mandatory Requirements.

Separate Envelope - COST PROPOSAL—ATTACHMENT F: Provide cost information as detailed in Section 6 in this RFP. All costs, as requested, for furnishing the product(s) and/or service(s) must be included in this proposal. The cost proposal must NOT be listed in any other part of the proposal response.

2.5. Multiple Proposals

Multiple proposals from a proposer will be permissible; however, each proposal must conform fully to the requirements for proposal submission. Each such proposal must be separately submitted and labeled as Proposal #1, Proposal #2, etc. on each page included in the response

2.6. Withdrawal of Proposals

Proposals shall be irrevocable until contract award unless the proposal is withdrawn. Proposers may withdraw a proposal, in writing, at any time up to the proposal due date and time or upon expiration of 180 days after the due date and time. The written withdrawal notice must be received by Purchasing. The notice must be signed by an authorized representative of the proposer. If a previously submitted proposal is withdrawn before the proposal due date and time, the proposer may submit another proposal at any time up to the proposal due date and time.

3. Proposal Selection and Award Process

3.1. Evaluation Committee

The County's evaluation committee will consist of members who have been selected because of their special expertise and knowledge of the service(s) and/or product(s) that are the subject of this RFP. Proposers may not contact members of the evaluation committee except at the request of the Purchasing Department.

3.2. Preliminary Evaluation

The proposals will be initially reviewed to determine if mandatory requirements are met. Failure to meet mandatory requirements shall result in the proposal being rejected. In the event that all proposers do not meet one or more of the mandatory requirements, the County reserves the right to continue the evaluation of the proposals that most closely meet the mandatory requirements of this RFP.

3.3. Right to reject proposals

The County reserves the right to reject any and all proposals.

3.4. Proposal Scoring

Accepted proposals will be reviewed by an evaluation committee and scored against the stated criteria. The committee may review references, request interviews/presentations, conduct demonstrations and/or conduct on-site visits. The resulting information will be used to score the

proposals. The evaluation committee's scoring will be tabulated, and proposals ranked based on the numerical scores received.

3.5. Evaluation Criteria

The proposals will be scored using the following criteria:

Description	Points
Organization Capabilities	75
Staff Qualifications	75
Proposer Solutions	500
Cost Proposal	350
Total	1000

3.6. Interviews/Presentations and/or Site Visits

Top-scoring proposers, based on the evaluation of the written proposal, may be required to have interviews/presentations to support and clarify their proposals, if requested by the County. The County will make every reasonable attempt to schedule the interview/presentation on the date specified in the Calendar of Events. Failure of a proposer to complete a scheduled interview/presentation to the County may result in rejection of that proposer's proposal. The County may conduct site visits of proposer and/or references' facilities to clarify or confirm proposal information.

3.7. Final Evaluation

Upon completion of any interviews/presentations and/or demonstrations by proposers, the County's evaluation team will review their evaluations and make adjustments to the scores based on the information obtained in the interview/presentation, demonstration, possible reference checks, and any other pertinent proposer information.

3.8. Award and Final Offers

Award will be granted in one of two ways. The award may be granted to the highest scoring responsive and responsible proposer after the original evaluation process is complete. Alternatively, the highest proposer or proposers may be requested to submit best and final offers. If the County requests best and final offers, they will be evaluated against the stated criteria, scored, and ranked by the evaluation committee. The award will then be granted to the highest scoring proposer following that process. However, a proposer should not expect that the County will request a best and final offer.

3.9. Notification of Intent to Award

All proposers who respond to this RFP will be notified in writing of the County's intent to award the contract(s) as a result of this RFP.

3.10. Appeals Process

Notices of intent to protest and protests must be made in writing. Protestors should make their protests as specific as possible and should identify Wisconsin Statutes or Portage County Ordinance provisions that are alleged to have been violated.

The written notice of intent to protest the intent to award a contract must be filed with Chris Schultz, Procurement Director, Portage County Wisconsin, 1462 Strongs Ave, Stevens Point, WI 54481, and received in his office no later than five (5) working days after the notice of intent to award is issued.

The written protest must be received in his office no later than ten (10) working days after the notice of intent to award is issued.

The decision of the Procurement Director may be appealed to the Corporation Counsel Office within (5) working days of issuance. The appeal must allege a violation of a Wisconsin Statute or a Portage County Ordinance provision.

3.11. Negotiate Contract Terms

The County reserves the right to negotiate the terms of the contract, including the award amount, with the selected proposer prior to entering into a contract. If contract negotiations cannot be concluded successfully with the highest scoring proposer, the County may negotiate a contract with the next highest scoring proposer.

4. Requirements

4.1. Mandatory Requirements

Submit response using Attachment D Mandatory Requirements under Tab 3 of proposal - see section 2.4 for proposal submittal format.

The following requirement(s) are mandatory, and the proposer must satisfy them as a pass/fail pre-screening requirement. Any proposal submitted not in compliance with mandatory requirements will be rejected and not evaluated or scored.

4.1.1. Must have been in the document Prepping and Scanning Business for at least 3 years.

4.1.2. Demonstrate having security and protocols in place for scanning sensitive and confidential documents.

4.1.3. Demonstrate having worked with Government and/or Municipal entities on scanning projects.

4.2. Contract Requirements

The awarded contractor is expected to fulfill the following contract requirements.

- 4.2.1. The contractor will provide Document Prepping services that include but are not limited to Staple Removal, Page Repair, Taping, Sort of Large Format, unfolding, and barcodes
- 4.2.2. Document Scanning Services that include but are not limited to ADF Scanner/Large Format/Plotter Scanner, 300 dpi, duplex, B&W, Color, auto blank page deletion, auto rotation, and other clean up filters
- 4.2.3. A variety of Quality Control levels of scanning with an indication of what those different levels pertain to as far as quality and accuracy. Please see 5.3.2 in proposal solutions to provide more information on the quality and accuracy levels of your scanning process.
- 4.2.4. Document indexing services that may include potential hand keying or customization program that can accurately create file names for the documents that later will be searchable using IMS 21 computer software. The contractor will also need to provide a database table (index) of the named pdf files with columns representing the name of the file tax parcel number, file name/permit number, description along with municipality code, town, range, section, quarter/quarter.
- 4.2.5. Secure FTP (SFTP) Data Delivery of electronic files during and after the completion of the project.
- 4.2.6. Post processing review period so the county can determine how to proceed with hard copy of documents. Contractor must be able to provide confidential document destruction and/or demonstrate how the hard copy of the document will be returned to the county.
- 4.2.7. The contractor must also be able to provide 24-hour turnaround on On-Demand Request processing for documents within its possession throughout the duration of the project except on Weekends or Holidays. If a vendor has all of the documents for a project those requests might be up to 3-6 per day. The county is willing to work with a vendor to take documents in smaller patches for scanning down to as little as 10-15% of each project so only a limited amount of the documents are not in the county possession at any given time. This concession cannot dramatically increase the amount of time it takes the project to be completed.
- 4.2.8. Subcontractors
The Contractor shall be responsible for Contract performance when subcontractors are used. However, when subcontractors are used, they must abide by all terms and conditions of the Contract. If subcontractors are to be used, the Contractor must clearly explain their participation.

4.3. Potential Projects

4.3.1 Sanitary Permits:

- Product will be a pdf file of each permit named with (tax parcel #) (permit #) (short description).pdf;
 - Tax parcel # and permit # are as written on application form.

- Short description is type of system as listed on application form.
- Can provide database table with current tax parcel and sanitary permit number. However, many tax parcels have multiple permits and about half of permits have a permit number in our database listed as “None”.
- Sanitary Permits have been scanned in by our department since July 2020. This equates to approximately 500 permits that have been previously scanned in which have a red “S” on the front of the permit indicating that permit has been scanned. These are scattered throughout the drawers.
- Full Color scanning.

4.3.2 Zoning Permits:

- Product will be a pdf file of each permit named with (tax parcel #) (permit #) (short description).pdf;
 - Tax parcel #'s are as written on application form; if no tax parcel number is shown on form, then use municipality/town/range/section/quarter/quarter in its place. Tax parcel number seems to be consistently used following 1986.
 - permit # is likely written as a sequential number for example (12345); needs to be named as (ZP-1979-12345). Where 1979 is the year, the permit is issued.
 - Short description is type of structure as listed on application form; may provide list of default descriptions.
- Can provide database table with Active tax parcels. We do not have permit number in existing databases.
- Microfilm images are currently grouped by town, range, section.
- Black and white scanning.

4.3.3 BOA Appeals/Petitions:

- Product will be a pdf file of each file named with (tax parcel #) (permit #) (Type of Request and short description).pdf;
 - Tax parcel #s are written on application forms in the file. Older files prior to 1986 may not contain tax parcel numbers. If no tax parcel number is shown on form, then use municipality/town/range/section/quarter/quarter in its place.
 - permit # is likely written as example (A79-25or P79-25) needs to be named as (PET-1979-025).
 - Type of Request and Short description is as listed on file folder label.
- Can provide database table with current tax parcel. We do not have permit number in existing databases.
- BOA file drawers are organized by Town, Range, Section. Each file folder in the drawer represents a separate BOA Petition. File folders are labeled with the name of the petitioner; quarter section – Town, Range, Section; Municipality; Permit Number; Type of Request – Variance, Special Exception or Administrative Appeal; and short description of request.
- Mixed color/ black and white scanning.

4.3.4 P&Z Requests:

- Product will be a pdf file of each file named with (tax parcel #) (permit #) (short description).pdf;
 - Tax parcel # are as written on application form in the file. Some files may apply to more than 1 tax parcel, if more than 5 tax parcels apply then use municipality/town/range/section/quarter/quarter. If no tax parcel number is shown on form, then use municipality/town/range/section/quarter/quarter in its place.
 - permit # is likely written as example (R79-25) needs to be named as (REQ-1979-025).
 - Short description is type of Request as listed on file folder label.
- Can provide database table with current tax parcel. We do not have permit number in existing databases.
- Mixed color/ black and white scanning.

4.3.5 Major Subdivision Files and Petitions for Modifications:

- File folders for Subdivisions are labeled with the name of the Subdivision; quarter/quarter section– Section, Town, Range; Municipality.
- Product for Subdivision files will be a pdf file of each file named with (Municipality, Town, Range, Section, Quarter/Quarter) (subdivision name) (short description).pdf;
 - Subdivision Names are as written on file folder label.
 - Short description is number of lots as listed on plat map or default description provided by P&Z
- File folders for Petitions for Modification are labeled with the name of the petitioner; – Section, Town, Range; Municipality; Modification Permit Number; and short description of modification request.
- Product for Petition for Modification files will be a pdf file of each file named with (tax parcel number) (permit #) (short description).pdf;
 - Tax parcel # are as written on application form in the file. Some files may apply to more than 1 tax parcel, if more than 5 tax parcels apply then use municipality/town/range/section/quarter/quarter. If no tax parcel number is shown on form, then use municipality/town/range/section/quarter/quarter in its place.
 - permit # is likely written as example (M79-25) needs to be named as (MOD-1979-025).
 - Short description is type of modification as listed on file folder label
- Mixed color/ black and white scanning.

4.4. County Requirements

The County will provide the following information and services to aide in the completion of the project. This list is not exhaustive, but does include items the County knows they are willing to provide at this time:

- 4.4.1. The county will provide access to a database with all the County Tax Parcels listed.

- 4.4.2. The County will provide access to documents pick up/shipping for scanning purposes, and/or return Monday thru Friday except holidays from 7:30AM to 4:30PM.
- 4.4.3. P&Z can package paper files into boxes if desired by the contractor or develop a system for packaging with the vendor.
- 4.4.4. The County will assist in the logistics of delivering the documents weather by shipping or pickup. However, the cost of that service and the delivery of the documents back to P&Z need to be included as part of doing each project.

5. Proposer Information and Solutions

Submit response under Tab 2 of proposal - see section 2.4 for proposal submittal format.

5.1. Organization Capabilities

Describe the organization/company's experience and capabilities providing similar services to those required. Be specific and detail no more than three projects/contracts: description of work, dates, locations, challenges and results. (75 Points)

5.2. Staff Qualifications

Identify key staff your organization/company will assign to fulfill the contract requirements. Detail who would be contract manager(s), etc. Provide a synopsis describing the educational and work experience for each of the key staff who would be assigned to the project/program. Detail the number of hours for each key staff member that you estimate will be needed to fulfill the contract requirements. (75 Points)

5.3. Proposer Solutions-

- 5.3.1. Describe any methods used to ensure the county gets scanned documents that meet the requirements of the sample project and various projects indicated in 4.3. Specifically highlight any testing done or pilot runs you would consider performing for County review prior to completion of the various projects. (50 Points)
- 5.3.2. Describe the levels of Scanning Accuracy that your company provides and what that means in logistical terms or accuracy of the finished scanned documents. Describe specifics of what is reviewed during quality control procedures and methods used to achieve accuracy. (100 Points)
- 5.3.3. P&Z currently uses Transcendent Technologies Ascent Permitting program as its primary means of lookup for digital documents. This program requires exact matches for tax parcel number or permit number to complete lookup of digital documents. Some files do not contain current tax parcels but rather are generalized to Town, Range, Section. Some files contain permit number that are not known to Transcendent databases and therefore cannot be looked up. P&Z also has IMS 21 Explorer which allows for expanded search and lookup options beyond exact matches. Please provide any additional suggestions for use of the database table or alternatives to existing software to facilitate look up and maintenance of the scanned files, such as the use of a hyperlinked unique key or other field in the database table that links directly to the scanned file. (50 Points)

- 5.3.4. Some files contain inactive tax parcel numbers or inaccurate permit numbers compared to existing databases. Describe your company’s ability to identify files with inactive tax parcel numbers or inaccurate permit numbers compared to existing databases. Do you offer any services after completion of scanning and file naming that would assist us in renaming inactive files or amending file names if errors exist? (50 Points)
- 5.3.5. Program delivery – detailed work plan and timetable for completing the sample project in Attachment F. Include any items we should consider based on the size and scope of this project. Recommendations indicating other similar projects you may have referenced in 5.1 or considerations other Municipalities choose when dealing with similar documents would be warranted. (100 Points)
- 5.3.6. Detail your firms understanding of the risks, challenges, and barriers for overall scanning of documents. Specifically address the potential work plans and (timetable) number of days each subproject would take and the timeframe all projects could be completed by if the specifications were similar to our sample project for projects listed in 4.3.2-4.3.5 (100 Points)
- 5.3.7. Include any reports or reporting methods used to inform the county on the progress of the various scanning projects as they move through the process. (25 Points)
- 5.3.8. Detail any services and/or levels of service you provide that you feel exceed other contractors in the field of document scanning. (25 Points)

5.4. Proposer References

Submit response using Attachment B References under Tab 2 of proposal – see section 2.4 for proposal submittal format.

Proposer must supply references of three firms to which similar products/service have been provided within the past five years to a comparable sized institution or company. If contacted, all of those references must verify that a high level of satisfaction was provided.

6. Cost Proposal

6.1. General Instructions for the Cost Proposal and how it will be Scored

All prices must be quoted in U.S. Dollars.

Purchasing will score 300 points of the cost proposals by prorating with the lowest cost proposal given the highest score. The formula is as follows: Calculation of points awarded to subsequent proposals will use the lowest dollar proposal amount as a constant numerator and the dollar amount of the firm being scored as the denominator. This number is then multiplied by the number of points given to the cost section of the RFP, resulting in the cost proposal score.

$$\frac{\text{Lowest Cost Proposed}}{\text{Other Proposed Cost}} \times \text{Maximum Points Assigned to Cost} = \text{Score}$$

An additional 50 points of the cost score will be awarded if the vendor provides a comprehensive list of prices and services that the company provides

6.2. Format for Submitting Cost Proposal.

Use Attachment F Cost Proposal. Submit one marked original plus one copy. Seal in an envelope and submit within the proposal package. The outside of the envelope should clearly state "Cost Proposal" and the name of proposer.

6.3. Fixed Price Period

The awarded contractor must hold the accepted prices and/or costs for the entire contract period. Any adjustment to prices and/or costs at the beginning of a contract renewal period will be negotiated between the County and the Contractor

7. Contract Cancellation

This contract may be terminated by either party under the following conditions:

- 7.1 The County may terminate the contract at any time at its sole discretion by delivering 30 days written notice to the Firm.

If the problem is service performance, Firm will be advised in writing of unsatisfactory performance and intent to cancel this contract. Firm will be given a period of time to 'cure' the performance. If the performance does not improve, Firm will be given 30 days written notice that the contract will be cancelled. **Upon termination, the County's liability will be limited to the pro rata cost of the services performed as of the date of termination.**

- 7.2 In the event the Firm terminates the contract, for any reason whatsoever, it will require written certified letter notification delivered to the Purchasing Department not less than 60 days prior to said termination. The Firm will, in turn, refund the County, within 30 days of said termination, all payments made hereunder by the County to the Firm for work not completed.

- 7.3 If at any time the Firm's performance threatens the health and/or safety of the County or the public, the County has the right to cancel and terminate the contract without notice.

- 7.4 The County will retain the option to select a different contractor after contract cancellation or utilize a different selection and/or bidding process, if deemed to be in County's best interest.

ATTACHMENT A

SIGNATURE AND AUTHORITY AFFIDAVIT FORM

PROPOSING COMPANY NAME: _____

FEIN (Federal Employer ID Number) _____ OR _____ Social Security # (if Sole Proprietorship)

Address: _____

City _____ State _____ Zip + 4 _____

Number of years in Business _____

Name the person to contact for questions concerning this proposal.

Name _____ Title _____

Phone (____) _____ Toll Free Phone (____) _____

Fax (____) _____ Email Address _____

In signing this proposal, we also certify that we have not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition; that no attempt has been made to induce any other person or firm to submit or not to submit a proposal; that this proposal has been independently arrived at without collusion with any other proposer, competitor or potential competitor; that this proposal has not been knowingly disclosed prior to the opening to any other proposer or competitor; that the above statement is accurate under penalty of perjury.

The undersigned, having familiarized themselves with the conditions affecting the cost of the work, having read completely the requirements, hereby proposes to perform everything required and to provide and furnish labor, materials, equipment, tools and all other services and supplies necessary to produce in a complete and workmanlike manner all of the materials or products described in the project relating to this proposal.

I further certify that I have carefully examined the proposal documents and all terms herein, and site where the work is to be done and have no agreements to prevent the completion of said work.

Signature

Title

Name (type or print)

Date

This firm hereby acknowledges receipt / review of the following addendum(s) (If any)

Addendum # _____ Addendum # _____ Addendum # _____ Addendum # _____

ATTACHMENT B

REFERENCES

Proposer: _____

Provide company name, address, contact person, telephone number, and appropriate information on the product(s) and/or service(s) provided to customers similar to those requested in this solicitation document. Potential subcontractors cannot be references. Any subcontractor arrangement for the completion of this work shall be listed on a separate page.

Company Name: _____

Address (include Zip + 4) _____

Contact Person: _____ Phone No. _____

E-Mail Address: _____

Product(s) Used and/or Service(s) Provided: _____

Company Name: _____

Address (include Zip + 4) _____

Contact Person: _____ Phone No. _____

E-Mail Address: _____

Product(s) Used and/or Service(s) Provided: _____

Company Name: _____

Address (include Zip + 4) _____

Contact Person: _____ Phone No. _____

E-Mail Address: _____

Product(s) Used and/or Service(s) Provided: _____

Company Name: _____

Address (include Zip + 4) _____

Contact Person: _____ Phone No. _____

E-Mail Address: _____

Product(s) Used and/or Service(s) Provided: _____

ATTACHMENT C

DESIGNATION OF CONFIDENTIAL AND PROPRIETARY INFORMATION

The attached material submitted in response to Bid/Proposal # _____ includes proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5), Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law. As such, we ask that certain pages, as indicated below, of this bid/proposal response be treated as confidential material and not be released without our written approval.

Prices always become public information when bids/proposals are opened, and therefore cannot be kept confidential.

Other information cannot be kept confidential unless it is a trade secret. Trade secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:

1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.
2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

We request that the following pages not be released:

Section	Page #	Topic

IN THE EVENT THE DESIGNATION OF CONFIDENTIALITY OF THIS INFORMATION IS CHALLENGED, THE UNDERSIGNED HEREBY AGREES TO PROVIDE LEGAL COUNSEL OR OTHER NECESSARY ASSISTANCE TO DEFEND THE DESIGNATION OF CONFIDENTIALITY AND AGREES TO HOLD THE STATE HARMLESS FOR ANY COSTS OR DAMAGES ARISING OUT OF THE COUNTY'S AGREEING TO WITHHOLD THE MATERIALS.

Failure to include this form in the bid/proposal response may mean that all information provided as part of the bid/proposal response will be open to examination and copying. The County considers other markings of confidential in the bid/proposal document to be insufficient. The undersigned agrees to hold the County harmless for any damages arising out of the release of any materials unless they are specifically identified above.

Company Name _____

Authorized Representative _____
Signature

Authorized Representative _____

Type or Print

Date _____

ATTACHMENT D

MANDATORY REQUIREMENTS

Proposer: _____

Can meet mandatory requirement 4.1.1? Yes _____ No _____

Can meet mandatory requirement 4.1.2? Yes _____ No _____

Can meet mandatory requirement 4.1.3? Yes _____ No _____

ATTACHMENT E**STANDARD TERMS AND CONDITIONS**

- 1.0 SPECIFICATIONS:** The specifications in this request are the minimum acceptable. When specific manufacturer and model numbers are used, they are to establish a design, type of construction, quality, functional capability and/or performance level desired, unless otherwise specified. When alternates are bid/proposed, they must be identified by manufacturer, stock number, and such other information necessary to establish an acceptable equivalency. The County shall be the sole and final judge of equivalency.
- 2.0 HOW TO AMEND A REQUEST FOR BID, PROPOSAL OR QUOTE:**
- 2.1** Public Works Projects are subject to Wis Stats 66.0901(5): If a person submits a bid or proposal for the performance of public work under any public contract to be let by a municipality and the bidder claims that a mistake, omission or error has been made in preparing the bid, the bidder shall, before the bids are opened, make known the fact that an error, omission or mistake has been made. If the bidder makes this fact known, the bid shall be returned to the bidder unopened, and the bidder may not bid upon the public contract unless it is re-advertised and relet upon the re-advertisement. If a bidder makes an error, omission or mistake and discovers it after the bids are opened, the bidder shall immediately and without delay give written notice and make known the fact of the mistake, omission or error which has been committed and submit to the municipality clear and satisfactory evidence of the mistake, omission or error and that it was not caused by any careless act or omission on the bidder's part in the exercise of ordinary care in examining the plans or specifications and in conforming with the provisions of this section. If the discovery and notice of a mistake, omission or error causes a forfeiture, the bidder may not recover the moneys or certified check forfeited as liquidated damages unless it is proven before a court of competent jurisdiction in an action brought for the recovery of the amount forfeited, that in making the mistake, error or omission the bidder was free from carelessness, negligence or inexcusable neglect.
- 2.2** Non-Public Work Projects: After a Request for Bid/Proposal/Quote has been filed with the Portage County Purchasing Department, the responder may submit an amended response BEFORE THE DUE DATE AND TIME set in the request. All the conditions and provisions of the original Bid/Proposal/Quote will be in effect. No submittals or amendments will be accepted after the due date and time of the request. This does not preclude the County from requesting additional information and/or clarification.
- 3.0 DEVIATIONS AND EXCEPTIONS:** Deviations and exceptions from original text, terms, conditions, or specifications shall be described fully, on the bidder's/proposer's letterhead, signed, and attached to the request. In the absence of such statement, the bid/proposal shall be accepted as in strict compliance with all terms, conditions, and specifications and the bidders/proposers shall be held liable.
- 4.0 QUALITY:** Unless otherwise indicated in the request, all material shall be new, newest model year, and free from defects. Items which are used, demonstrators, obsolete, seconds, or which have been discontinued are unacceptable without prior written approval by the County.
- 5.0 QUANTITIES:** The quantities shown on this request are based on estimated needs. The County reserves the right to increase or decrease quantities to meet actual needs.
- 6.0 DELIVERY:** Deliveries shall be F.O.B. destination freight prepaid and included unless otherwise specified.
- 7.0 PRICING AND DISCOUNT:** The County qualifies for governmental discounts. Unit prices shall reflect these discounts.
- 7.1** Unit prices shown on the bid/proposal or contract shall be the price per unit of sale (e.g., gal., cs., doz., ea.) as stated on the request or contract. For any given item, the quantity multiplied by the unit price shall establish the extended price; the unit price shall govern in the bid/proposal evaluation.

- 7.2 Prices established in continuing agreements and term contracts may be lowered due to general market conditions.
- 8.0 **RESPONSES TO REMAIN OPEN:** Responses must remain open and will be deemed to be open and subject to acceptance until awarding of the bid/proposal is finalized, or a minimum of sixty (60) days unless otherwise specified.
- 9.0 **ACCEPTANCE-REJECTION:** The County reserves the right to accept or reject any or all bids/proposals, to waive any technicality in any bid/proposal submitted, request clarification of any bid/proposal, award a bid/proposal that is not the lowest price, and to accept any part of a bid/proposal as deemed to be in the best interests of the County.
- 10.0 **GUARANTEED DELIVERY:** Failure of the Contractor to adhere to delivery schedules as specified or to promptly replace rejected materials shall render the Contractor liable for all costs in excess of the contract price when alternate procurement is necessary. Excess costs shall include the administrative costs and other costs attributable to the delay.
- 11.0 **CONTRACT AND EXECUTION OF CONTRACT:** Unless otherwise specified in the bid/proposal, the successful responder agrees to enter into a contract, a copy of which will be on file in the office of the Portage County Purchasing Department. Contractor shall and will well and truly execute and perform this contract under the terms applicable to the satisfaction of the County and shall promptly make payment to each and every person or party entitled thereto of all the claims for work or labor performed and materials furnished in the performance of this contract.
- 12.0 **ENTIRE AGREEMENT:** These Standard Terms and Conditions shall apply to any contract or order awarded as a result of this request except where special requirements are stated elsewhere in the request; in such cases, the special requirements shall apply. Further, the written contract and/or order with referenced parts and attachments shall constitute the entire agreement and no other terms and conditions in any document, acceptance, or acknowledgment shall be effective or binding unless expressly agreed to in writing by the County.
- 13.0 **APPLICABLE LAW AND COMPLIANCE:** This contract shall be governed under the laws of the State of Wisconsin. The Contractor shall at all times comply with and observe all federal and state laws, local laws, ordinances, and regulations which are in effect during the period of this contract and which in any manner affect the work or its conduct. The County reserves the right to cancel this contract if the contractor fails to follow the requirements of s. 77.66, Wis. Stats., and related statutes regarding certification for collection of sales and use tax. The County also reserves the right to cancel this contract with any state or federally debarred contractor or a contractor that is presently identified on the list of parties excluded from federal procurement and non-procurement contracts.
- 14.0 **LICENSES AND PERMITS:** Contractor shall have and/or provide any and all licenses and permits required to perform the work specified and furnish proof of such licensing authorization and permits with their bids if required.
- 15.0 **ASSIGNMENT:** No right or duty in whole or in part of the Contractor under this contract may be assigned or delegated without the prior written consent of the County.
- 16.0 **NONEXCLUSIVE CONTRACT:** Unless otherwise stated, the County reserves the right to purchase work or materials outside of this contract.
- 17.0 **NONDISCRIMINATION & AFFIRMATIVE ACTION:** In connection with the performance of work under this contract, the Contractor agrees not to discriminate against any employee or applicant for employment because of age, race, religion, color, handicap, sex, physical condition, developmental disability as defined in s. 51.01(5), Wis. Stats., sexual orientation, gender identity and gender expression, or national origin. This provision shall include, but not be limited to, the following: employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.
- 18.0 **INDEPENDENT CAPACITY:** The parties hereto agree that the contractor, its officers, agents, and employees, in the performance of this agreement shall act in the capacity of an independent contractor and not as an officer, employee, or agent of the County. The contractor agrees to take such steps as may be necessary to ensure that each subcontractor of the contractor will be deemed to be an independent contractor and will not be considered or permitted to be an agent, servant, joint ventures, or partner of the County.

- 19.0 SAFETY REQUIREMENTS:** All materials, equipment, and supplies provided to the County must comply fully with all safety requirements as set forth by the Wisconsin Administrative Code and all applicable OSHA Standards.
- 20.0 WARRANTY:** Unless otherwise specifically stated, equipment purchased as a result of this request shall be warranted against defects by the Contractor for one (1) year from date of receipt. The equipment manufacturer's standard warranty shall apply as a minimum and must be honored by the Contractor.
- 21.0 INSURANCE RESPONSIBILITY:** If insurance is required, satisfactory proof of the existence and carriage of such insurance of the kinds and limits specified will be required.
- 22.0 CANCELLATION:** The County reserves the right to cancel any contract in whole or in part without penalty due to non-appropriation of funds or for failure of the contractor to comply with terms, conditions, and specifications of this contract.
- 23.0 VENDOR TAX DELINQUENCY:** Vendors who have a delinquent Portage County tax liability may have their payments offset by the County.
- 24.0 OPEN RECORDS:** Both parties understand that the County is bound by the Wisconsin Public Records Law, and as such, responses and contracts are subject to and conditioned on the provisions of the law. Contractor acknowledges that it is obligated to assist the County in retaining and producing records that are subject to Wisconsin Public Records Law, and that the failure to do so shall constitute a material breach of the contract, and that the Contractor must defend and hold the County harmless from liability under that law. Except as otherwise authorized, those records shall be maintained for a period of seven (7) years after receipt of final payment under the contract.
- 25.0 MATERIAL SAFETY DATA SHEET:** If any item(s) on an order(s) resulting from this award(s) is a hazardous chemical, as defined under 29CFR 1910.1200, the Contractor shall provide one (1) copy of a Material Safety Data Sheet for each item with the shipped container(s) and one (1) copy with the invoice(s).
- 26.0 ADVERTISING AND NEWS RELEASES:** Reference to or use of the County, any of its departments, officials, or employees, for commercial promotion is prohibited. News releases pertaining to this procurement shall not be made without prior approval of the County. Release of broadcast e-mails pertaining to this procurement shall not be made without prior written authorization of the County.
- 27.0 HOLD HARMLESS:** The Contractor will indemnify, pay the cost of defense including attorney's fees, and save harmless the County and all of its officers, agents and employees from all suits, actions, or claims of any character directly related to any injuries or damages to any persons or property resulting from the operations of the contractor, or of any of its contractors, in prosecuting work under this agreement.
- 28.0 FOREIGN CORPORATION:** A foreign corporation (any corporation other than a Wisconsin corporation) which becomes a party to this contract is required to conform to all the requirements of Chapter 180, Wis. Stats., relating to a foreign corporation and must possess a certificate of authority from the Wisconsin Department of Financial Institutions, unless the corporation is transacting business in interstate commerce or is otherwise exempt from the requirement of obtaining a certificate of authority. Any foreign corporation which desires to apply for a certificate of authority should contact the Department of Financial Institutions, Division of Corporation, P. O. Box 7846, Madison, WI 53707-7846; telephone (608) 261-7577.
- 29.0 FORCE MAJEURE:** Neither party shall be in default by reason of any failure in performance of this contract in accordance with reasonable control and without fault or negligence on their part. Such causes may include, but are not restricted to, acts of nature or the public enemy, acts of the government in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes and unusually severe weather, but in every case the failure to perform such must be beyond the reasonable control and without the fault or negligence of the party.

ATTACHMENT F

SAMPLE PROJECT

Portage County Sanitary Permits

Inches: 1250"	Est Images=177,000	Est Documents=14,750
Est 12" Boxes=104	Est Images/Box=1,710	Est Documents/Box=142

- Current Storage: File Cabinets in P& Z Office located at 1462 Strongs Ave, Stevens Point, WI, 54481
- Filing Order: See notes
- Page Sizes: Assortment of Letter Size, Legal Size, 11X17 Size, Large Format (Mainly Letter Size)
- Page Types: Standard
- Overall Page Condition: Good

Additional Notes:

- Box is defined as a standard banker's box (10"x12"x15") with 12" storage capacity for legal size file folders
- Inches based upon 46 file cabinet drawers x 27" per drawer
- Estimated images per box based on 177,000 pages ÷ 1,242" = 142 images per inch X 12" box
- There is an unknown (small) percentage of large format documents intermixed within the documents
- Documents are stored within legal size folders which are labeled with tax parcel number (section / township)

PACKAGING / LOGISTICS

- Boxes for Transport/Shipping if needed provided by: Vendor (please include price for boxes)
- Packaging completed by: County
- Logistics provided by: Vendor either by Transport, Shipping, or On-Site Scanning
- Logistics Type: Dedicated Trips, shipping, or on-site scanning period. If you are doing trips or shipping a specified number of documents (up to 20%) of total will go out on Monday and Thursday of each week and return 72 business Hours or upon pick up of next patch of documents. Details coordinated after award of contract.
- Trip Frequency: Bi-Weekly

Additional Notes:

- Once the files have been boxed up after scanning, the county would like them to remain that way. We will need to determine the cost of boxes in the final price.

DATABASE FILE(S)

Customer Database Available: Yes

Additional Notes:

- Customer to provide database file(s) with tax parcel number (section / township) which is consistent with the file folder name label
 - This will be used to produce searchable files using IMS 21 Computer Software
- Customer to provide database file(s) with permit numbers
 - Used to confirm permit numbers that have been processed and identify exceptions such as permit

files not sent

- MS Excel, text, or CSV are formats for all database files

DOCUMENT PREP SERVICES

- Prep Completed by: Vendor
- Prep Intensity Level: County considers the prep intensity to be Average

Document Prep Tasks: Remove pages from folders, Sort or separate pages; Staple/Clip removal, Taping pages 6"x6" or smaller, Page Repair/Fix bent corners, Color scanning correct pages in order, correctly scanning larger pages

Additional Notes:

- Large format documents need to be sorted / separated as they will need to be scanned in large format

DOCUMENT SCANNING SERVICES

Scanner(s) Used: Vendor to determine
 Scan Type: Duplex
 Resolution: 300 dpi
 Bulk Scan Color: Full Color for all documents
 Auto Blank Deletions: Yes
 Auto Rotations: Yes
 Auto Separation: Yes
 Image Cleanup: Quality clean up of crop, speckle, and skew

- Additional Notes: Scanning will be in full color. We realize file sizes will be much larger.
- Large format documents scanned need to be scanned so they are still large documents and place in order

QUALITY CONTROL SERVICES

The County requires what it consider to be the following:

High/Highest Level Quality Control

1:1 page to image review of corresponding scanned image/ separate job step / blank deletions / page rotations / rescans or insert full color as required correct all double feeds

DOCUMENT INDEXING

The vendor may determine how to index the documents, but the finished PDF's must be searchable in software IMS 21 by tax parcel number, permit number, and short description to 99.9% accuracy.

DATA OUTPUT

Output to: Windows Folder/Files
Image Output: PDF
Multi-Page Documents: Yes
Custom Image Naming: Yes
OCR (Text Searchable): Yes

Additional Notes:

- o Required spaces and punctuation added for proper output formatting

A database file (Excel, text or CSV) will be expected at end of project that will include tax parcel and permit number to enable the county to compare data with existing database(s) to recognize inactive tax parcels or permits listed in customer system as "None"

DATA DELIVERY

Data Delivery Method: Secure
Drive Data Delivery Process one of the following: Customer download from Vendor

POST PROCESSING

Review Period (after data delivery): 90 Days
Post Processing - Documents: Post Return Documents for Restorage
Processing - Data: TBD

Additional Notes:

- Considerations for option to return boxes of hardcopy documents. Documents will need to be returned but not necessary to have them back in the folders.

SCAN ON DEMAND REQUEST PROCESSING

Est. Request Volume: TBD
Approved Requestors: Dan Bowers or Amy Heins of Portage County P&Z Staff
Provide list Required Response: Within 24 hours
Weekends/Holidays: No
Delivery Method: PDF within an email

Additional Notes:

- All records must be available for request while offsite at vendor within 24 hours of request
- Initial project strategy is for only a minimal number of boxes (files 8-15% of job) to be offsite at vendor for processing at any given time. Based on this, the amount of records requests is expected to be minimal
- Completed data (PDF files) will be returned with 72 hours from receiving upon completion to further minimize possibility of records requests

PROJECT REPORTING

Data Delivery Notifications: Daily
Exception Reports: Ongoing
Update/Summary Reports: Ongoing

Additional Notes:

- A data delivery email notification will be sent daily summarizing what was processed and delivered
- Data output will include database file(s) with tax parcel and permit numbers for customer comparison to existing database files (See Data Output) / No exception reports provided

PROJECT TIMELINE

Project Setup Start:	Within 60 Days of Contracting	Project Setup/Testing Completion:	TBD
Initial Records Pickup:	TBD	Processing Duration (Consecutive):	See Notes
Initial Data Delivery:	TBD	Estimated Weekly Output:	15%-20% of Project
Estimated Completion Date:	4-6 Weeks		

Additional Notes:

- Above stated timeline is based upon Scope of Work, Processing Specifications (including logistics schedule) as stated in this document. Project Timeline is subject to change based upon vendor and county production schedule, resources applied to project, equipment up-time, and any unforeseen circumstances including those relating to the COVID-19 pandemic.

ATTACHMENT G

COST PROPOSAL

Proposer: _____

Submit original plus one copy (Submit in separate envelope within proposal package)

Part I of Cost Score

Total Cost of completing Sample Project listed in Attachment F \$ _____ (300 Points) We realize costing project varies from vendor to vendor. However, we would ask you itemize you cost based on the bold typed areas in the sample project.

Part II of Cost Score

Please provide any variable pricing we could consider for the project in Attachment F or in future projects we may choose to do within the County. Examples would include but not be limited to ranges of rates for Document Processing, Quality of the image scanned, File Naming, Accuracy of the finished PDF document, Document Destruction, and Folder Re-Assembly. Provide any levels or conditions of materials that may change the rate range as well. (50 Points)